

FIG. 1

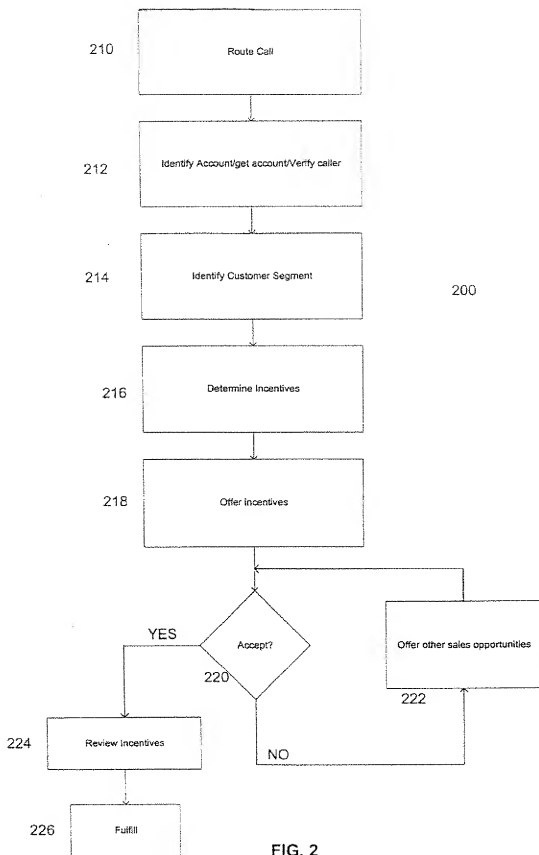


FIG. 2

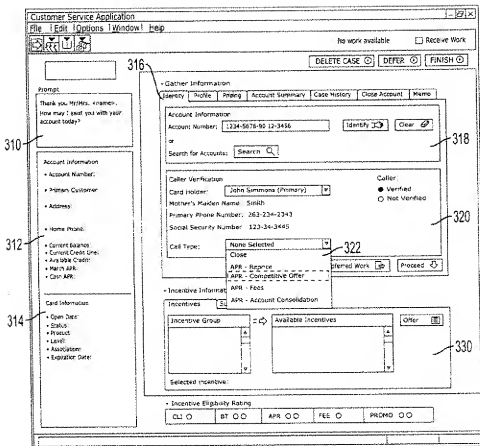


FIG. 3

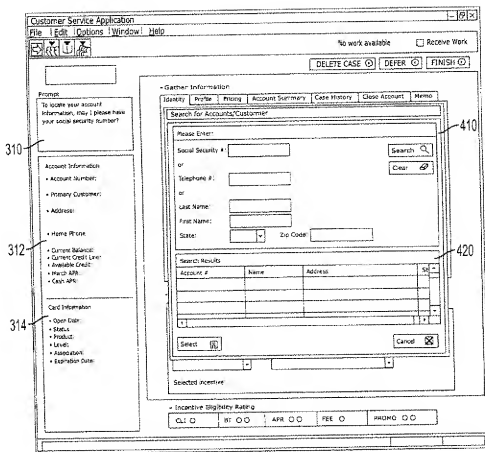


FIG. 4

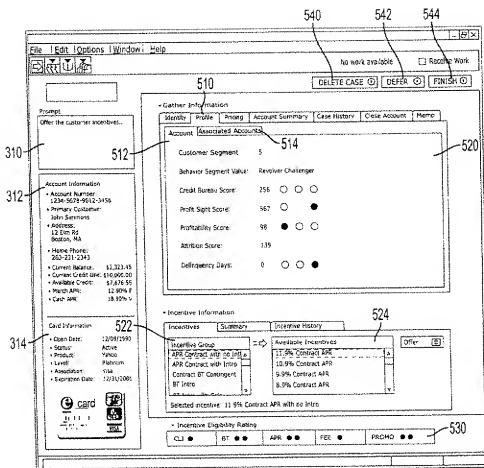


FIG. 5

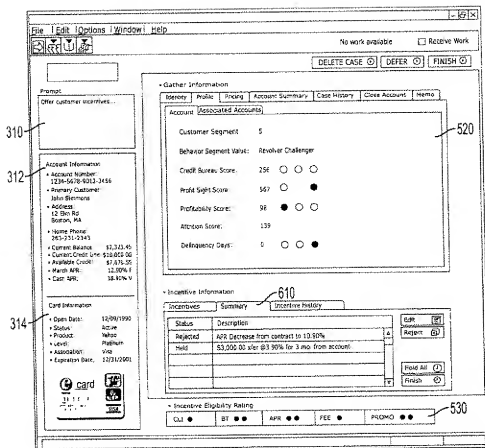


FIG. 6

File Edit Options Window Help

No work available ☐ Receive Work

DELETE CASE DEFER FINISH

Account

Offer customer incentives...

Account Information

- Account Number: 1234-5678-9012-3456
- Primary Customer: John Semmons
- Address: 12 Elm St, Boston, MA
- Home Phone: 283-231-2343
- Current Salary: \$2,122.45
- Current Credit Limit: \$10,000.00
- Available Credit: \$7,676.55
- Max. CA APR: 12.50% F
- Cash APR: 18.50% V

Card Information

- Over Due: 12/09/1992
- Status: Active
- Product: Visa
- Level: Platinum
- Acceptor: Visa
- Expiration Date: 12/31/2005

card

Gather Information

Identity Profile Aging Account Summary Case History Close Account Merge

Account Associated Accounts

Customer Segment: 5

Behavior Segment Value: Receiver Challenger

Credit Bureau Score: 256 ☐ ☐ ☐

Profit Slight Score: 567 ☐ ☐ ☒

Profitability Score: 98 ☒ ☐ ☐

Alteration Score: 139

Delinquency Days: 0 ☐ ☐ ☒

Incentive Information

Incentives Summary Incentive History

Status	Description	Date	
Filled	Full Check Fee Waiver	05/20/1999	A
Rejected	APR Decrease from contract to 10.50%	06/20/1999	
Held	\$3,000.00 xler @ 3.92% for 3 mo. from account.	06/15/1999	H

Incentive Eligibility Rating

CU ☒ BT ☒ APR ☒ FEE ☒ PRGND ☒

FIG. 7

Customer Service Application [1] [2] [3]

File Edit Options Window Help

It's work available ☐ Receive Work

DELETE CASE DEFER FINISH

Promoter

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Account Information

- Account Number:
- Primary Customer
- Address:
- Home Phone:
- Current Balance:
- Current Credit Limit:
- Available Credit:
- Match Aff:
- Cash Aff:

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Card Information

- Card Date:
- Status:
- Product:
- Level:
- Association:
- Expiration Date:

314

Gather Information

Identify Profile Pricing Account Summary Case History Close Account Memo

Account Information

Account Number: 1234-5678-90 12-3456 Identify Clear

or

Search for Accounts: Search

Retrieve Customer Work

Account: 1234-5678-9012-3456 Caller: John Simmons

Defer Date	Call Type	Reason	Caller (Role)
06/22/1999	Credit Line Increase	Caller had to decide on amount	John Simmons (P)
06/20/1999	APR Decrease	Caller had to tie hang up	Jane Simmons (S)
06/20/1999	Credit Line Increase	Caller needed more information	John Simmons (P)
06/15/1999	APR Waiver	Caller wanted full waiver	John Simmons (P)
06/13/1999	Rate Change	Caller wanted low fee for May	Jane Simmons (S)

Proceed Cancel

Selected Incentive:

Incentive Eligibility Rating

CLI ☐ BT ☐ APR ☐ FEE ☐ PROMO ☐

FIG. 8